

Office of the
Legislative Fiscal Analyst

FY 2005 Budget Recommendations

Joint Appropriations Subcommittee for
Economic Development and Human Resources

State History

Contents:

- 1.0 Summary
- 2.0 Issues
- 3.0 Programs
- 4.0 Additional Information

1.0 Summary: State History

Summary

The Division promotes Utah's history. Its mission is "preserving and sharing Utah's past for the present and the future." It maintains a research library, marks and preserves historic sites, collects and preserves historic artifacts and documentary material, assists local history and heritage organizations statewide, edits and publishes historic records, journals, and books. It operates the State's historic preservation office in compliance with federal regulations and helps other state agencies manage historic, anthropological, and archaeological resources.

	Analyst FY 2005 Base	Analyst FY 2005 Changes	Analyst FY 2005 Total
Financing			
General Fund	1,727,900		1,727,900
Federal Funds	570,000		570,000
Dedicated Credits Revenue	25,000		25,000
Total	\$2,322,900	\$0	\$2,322,900
Programs			
Administration	511,300		511,300
Libraries and Collections	369,000		369,000
Public History and Education	333,900		333,900
Office of Preservation	1,053,800		1,053,800
History Projects and Grants	54,900		54,900
Total	\$2,322,900	\$0	\$2,322,900
FTE/Other			
Total FTE	30		30

2.0 Issues: State History

2.1 Intent Language

The Analyst recommends the following intent:

It is the intent of the Legislature that funding for State History be non-lapsing subject to the provisions of UCA 63-38-8.1.

Funds encumbered to pay contractual obligations issued prior to May 1 shall also be considered non-lapsing.

3.0 Programs: State History

3.1 Administration

Recommendation

The Analyst recommends a budget of \$511,300.

	2003	2004	2005	Est/Analyst
Financing	Actual	Estimated*	Analyst	Difference
General Fund	542,200	486,200	486,300	100
General Fund, One-time		1,100		(1,100)
Dedicated Credits Revenue		25,000	25,000	
Total	\$542,200	\$512,300	\$511,300	(\$1,000)
Expenditures				
Personal Services	206,900	232,400	231,600	(800)
In-State Travel	4,300	2,800	2,800	
Out of State Travel	3,500	3,500	3,500	
Current Expense	297,500	269,500	269,300	(200)
DP Current Expense	29,900	4,100	4,100	
Other Charges/Pass Thru	100			
Total	\$542,200	\$512,300	\$511,300	(\$1,000)
FTE/Other				
Total FTE	4	4	4	0

*Non-state funds as estimated by agency

Purpose

The Administration Program provides the organizational infrastructure that supports all Division and Historical Society programs and activities. Administration provides leadership and management in organization, human resource management, fiscal and budgetary management, administrative rules and policies, and division planning. It is involved in the construction of the State Archives building and Capitol restoration. The Administration promotes the formation and continuation of partnerships and the use of history as an integral part of economic ecosystems. They are also involved in interfacing with other agencies and levels of government. Statutory authority is identified in UCA 9-8-201, 202, 203.

Activity

Heritage Education Partnerships				
1999	2000	2001	2002	2003
94	97	105	110	121
Heritage Economic Development Partners				
1999	2000	2001	2002	2003
86	90	99	107	115

3.2 Collections

Recommendation

The Analyst recommends a budget of \$369,000.

	2003	2004	2005	Est/Analyst
Financing	Actual	Estimated*	Analyst	Difference
General Fund	382,600	368,700	369,000	300
General Fund, One-time		1,200		(1,200)
Total	\$382,600	\$369,900	\$369,000	(\$900)
Expenditures				
Personal Services	359,100	315,600	314,700	(900)
In-State Travel	100	500	500	
Out of State Travel		1,100	1,100	
Current Expense	18,600	40,500	40,500	
DP Current Expense	4,800	12,200	12,200	
Total	\$382,600	\$369,900	\$369,000	(\$900)
FTE/Other				
Total FTE	6	6	6	0
*Non-state funds as estimated by agency				

Purpose

The research library and collections activities began in 1897 as the Utah State Historical Society. In statute, the division is directed to “stimulate research, study and activity in Utah history and related history; maintain a specialized history library; collect, preserve, and administer historical records relating to the history of Utah; administer, collect, preserve, document, interpret, develop, and exhibit historical artifacts, documentary materials, and other objects relating to the history of Utah for educational purposes”; and to “create and maintain an inventory of historic markers and monuments that are accessible to the public throughout the state.” This program fulfills those responsibilities. The program partners with and provides technical assistance to organizations statewide; provides online research resources, and provides a retail outlet for division publications. It also cooperates with other agencies and museums to strengthen their programs. Statutory authority is identified in UCA 9-8-203.

Collections stimulates and facilitates research in Utah history by collecting and preserving historical materials and artifacts. They also maintain a specialized Utah history collection. Their research library provides public access to historical collections, through requests on-site, through the mail, or via the Internet. Collections is responsible for the care and management of division historic documentary materials and artifact collections held in trust for the citizens of Utah. The program is also responsible for exhibits related to the collections, including online exhibits. They provide tours for educational groups to exhibits and the research library.

The division promotes the education of Utah citizens and all level of students by fostering and stimulating study in and research of Utah history. It provides access and availability to Utah's historical and documentary resources through the Internet and at a research facility. In this information age, the state historical resources, and services to those resources, are available through an online collections catalog, online searchable databases, including the Governor's Olympic Photograph collection and the Shipler Commercial Photographic collection: a searchable periodicals database, a searchable Markers and Monuments database. The site also includes over 500 archival finding aids, including manuscript and photograph registers and inventories in a searchable database, as well as holdings lists, indexes bibliographies, and guides. This program maintains two content-rich web sites on Utah history for students of all ages and adult learners, the History For Kids and the Utah History To Go web site. It also cooperates with other agencies and museums to strengthen their programs.

Activities

1999	2000	2001	2002	2003
Digitization of photographic images for availability on the Internet:				
0	0	0	4,000	9,000
Improved access and availability web site visits:				
N/A	N/A	N/A	N/A	370,000
Collection added to on-line catalogue Horizon:				
650	550	1,100	1,600	1,200

3.3 Public History and Education

Recommendation The Analyst recommends a budget of \$333,900.

	2003	2004	2005	Est/Analyst
Financing	Actual	Estimated*	Analyst	Difference
General Fund	305,500	334,000	333,900	(100)
General Fund, One-time		900		(900)
Total	\$305,500	\$334,900	\$333,900	(\$1,000)
Expenditures				
Personal Services	282,200	282,600	281,600	(1,000)
In-State Travel	800	1,100	1,100	
Out of State Travel	2,600	2,800	2,800	
Current Expense	19,900	43,500	43,500	
DP Current Expense		4,900	4,900	
Total	\$305,500	\$334,900	\$333,900	(\$1,000)
FTE/Other				
Total FTE	5	5	5	0
*Non-state funds as estimated by agency				

Purpose

Public History, Education and Communication is responsible for public education. They also produce the *Utah Historical Quarterly* and the *Currents* newsletter, coordinate outreach programs, volunteers, research, and publication of Utah's history. The program seeks to communicate and educate about history and the division programs in a way that will raise awareness. They also assist local historical groups in gathering and disseminating and publishing history. Statutory authority is found in UCA 9-8-201, 9-8-203, and 9-8-206.

Staff assists teachers and helps develop quality curriculum-driven education programs. They also work with colleges and universities to advance the teaching of state and local history. Additionally they publish materials on Utah history and prehistory and they plan and execute public programs for people of all ages. The program sponsors history conferences and workshops, provides technical assistance, and develops educational materials to help instructors in both public and higher education.

Activities

	2001	2001	2003	2004 (Est.)
Students reached through educational outreach programs:				
4,900	5,000	5,250	5,280	
Publications: newsletter circulation				
3,307	3,175	8,000	8,500	
Conferences and Workshops sponsored:				
2	2	2	4	

3.4 Office of Preservation

Recommendation The Analyst recommends a budget of \$1,053,800.

	2003	2004	2005	Est/Analyst
Financing	Actual	Estimated*	Analyst	Difference
General Fund	477,500	484,100	483,800	(300)
General Fund, One-time		2,500		(2,500)
Federal Funds	594,200	570,000	570,000	
Total	\$1,071,700	\$1,056,600	\$1,053,800	(\$2,800)
Expenditures				
Personal Services	851,800	904,600	901,800	(2,800)
In-State Travel	7,200	7,100	7,100	
Out of State Travel	17,900	8,100	8,100	
Current Expense	65,600	56,700	56,700	
DP Current Expense	4,400	23,100	23,100	
Other Charges/Pass Thru	124,800	57,000	57,000	
Total	\$1,071,700	\$1,056,600	\$1,053,800	(\$2,800)
FTE/Other				
Total FTE	15	15	15	0

*Non-state funds as estimated by agency

Purpose

The Preservation Program was created by the Legislature to be the archaeological, anthropological, and preservation authority for the state. This program is responsible for archaeological protection compliance, archaeological site and project records. They are also responsible for nominations to the National Historic Register and providing assistance to developers in restoring and rehabilitating historic resources through tax credits, grants, technical assistance, and heritage development. It maintains partnerships with state and federal agencies and local preservation and archaeological organizations. The office consults with a variety of agencies and does outreach educational programs. Program authority is established in UCA 9-8-205, 303, 305, 401-405, and 503-504, and National Historic Preservation Act of 1966.

This program invests considerable effort in public education and in providing educational products and programs that promote Utah history, culture, and archaeology. It is continually working to add and improve services online, streamline governmental processes to make regulations less burdensome, and to creating partnerships. The program provides support to local development efforts through the Certified Local Government program and through grants and technical assistance. It promotes the preservation of historic and archaeological sites. The program improves the quality of life and protects the foundation of community values through the protection, enhancement, interpretation, and development of the state's heritage resources.

Archaeological Sites and Projects entered into GIS database						
	1999	2000	2001	2002	2003	2004 (est)
Sites	189	205	516	1,022	2,336	3,500
Projects	352	361	413	562	1,354	1,550
Assistance						
*Rehab Tax Credit						
Investment*	5.35 mil	3.4 mil	3.4 mil	12 mil	8 mil	8 mil
Review and	3,003	3,447	3,586	3,600	3,526	3,700
Compliance Cases						
Number of CLG's	75	75	80	83	85	87
Number of NR	N/A	27	22	14	25	27
Nominations						
*(Tax credits are driven by external factors)						

3.5 History Projects

Recommendation

The Analyst recommends a budget of \$54,900.

	2003	2004	2005	Est/Analyst
	Actual	Estimated*	Analyst	Difference
Financing				
General Fund	67,600	54,900	54,900	
Federal Funds	95,500			
Beginning Nonlapsing	216,800	133,800		(133,800)
Closing Nonlapsing	(133,800)			
Total	\$246,100	\$188,700	\$54,900	(\$133,800)
Expenditures				
Current Expense	500			
Other Charges/Pass Thru	245,600	188,700	54,900	(133,800)
Total	\$246,100	\$188,700	\$54,900	(\$133,800)

*Non-state funds as estimated by agency

Purpose

The History Projects program administers state funded grants to various organizations, including local history, educational, preservation, and archaeological organizations. This program enables heritage programs statewide to do projects that benefit individuals and communities and to preserve and share heritage resources of all types. Statutory authority is identified in UCA 9-8-203.

The History project program offers support to heritage and history organizations statewide. They provide technical assistance and services to historic preservation, traditional history, antiquities, and collections programs. They also assist communities in making the most of their heritage resources.

Activities

History	2000	2001	2002	2003
Grants	\$65,026	\$92,644	\$62,698	\$78,400
Number of Grants	28	32	18	27
Grant to Utah Heritage Foundation and Utah History Fair Programs				
Grants	\$31,000	\$31,000	\$31,000	\$21,000
Public Education, Outreach, and Educational Workshops Held				
Number of Workshops	67	66	71	57

4.0 Additional Information

4.1 Funding History

	2001	2002	2003	2004	2005
Financing	Actual	Actual	Actual	Estimated*	Analyst
General Fund	1,979,800	2,438,400	1,775,400	1,727,900	1,727,900
General Fund, One-time				5,700	
Federal Funds	551,800	516,900	689,700	570,000	570,000
Dedicated Credits Revenue		10,800		25,000	25,000
Beginning Nonlapsing	231,900	181,800	216,800	133,800	
Closing Nonlapsing	(181,700)	(216,800)	(133,800)		
Total	\$2,581,800	\$2,931,100	\$2,548,100	\$2,462,400	\$2,322,900
Programs					
Administration	585,800	616,600	542,200	512,300	511,300
Libraries and Collections	705,000	725,100	382,600	369,900	369,000
Public History and Education	131,700	138,800	305,500	334,900	333,900
Office of Preservation	972,100	1,015,300	1,071,700	1,056,600	1,053,800
History Projects and Grants	187,200	435,300	246,100	188,700	54,900
Total	\$2,581,800	\$2,931,100	\$2,548,100	\$2,462,400	\$2,322,900
Expenditures					
Personal Services	1,832,700	1,912,200	1,700,000	1,735,200	1,729,700
In-State Travel	19,400	17,000	12,400	11,500	11,500
Out of State Travel	10,000	12,800	24,000	15,500	15,500
Current Expense	375,700	395,000	402,100	410,200	410,000
DP Current Expense	46,500	37,400	39,100	44,300	44,300
Other Charges/Pass Thru	297,500	556,700	370,500	245,700	111,900
Total	\$2,581,800	\$2,931,100	\$2,548,100	\$2,462,400	\$2,322,900
FTE/Other					
Total FTE	33	33	30	30	30

*Non-state funds as estimated by agency.

4.2 Federal Funds

		FY 2003	FY 2004	FY 2005
Program		Actual	Estimated	Analyst
Historic Preservation Fund	Federal	689,700	570,000	570,000
	Required State Match	275,900	228,000	228,000
	Total	\$965,600	\$798,000	\$798,000